

Cloudoko Bookings

G-Cloud 15 Service Definition

T +44 (0)1904 500808 | **E** support@cloudoko.com | **www.cloudoko.com**

Cloudoko Ltd is registered in England & Wales under company number 09294405 | Registered office: 1 Derwent Business Centre, Clarke Street, Derby, DE1 2BU

Service overview

Cloudoko Bookings can help accelerate your “digital by default” channel shift strategy by allowing your customers to book appointments with you online.

The service can handle employee, resource and team bookings that have complex diaries and working patterns. Meanwhile it simultaneously ensures that your CRM / Contact Centre stays in the loop.

Benefits to you

- Improve customer service by enabling 24/7 online appointment bookings
- Increase staff productivity and performance
- Easy to use diary system to plan resources and staff
- Increase customer engagement
- Enhance functionality on your public website
- Can be used as a mobile worker solution
- Supports 100,000’s of transactions/month and scales to your needs
- Achieve savings by moving processes online where per transaction costs are lower
- Integration with CRM is a complex activity - our service takes care of the hard work for you.
- Reduce development and maintenance costs through business process re-use
- Support portal staffed by engineers responsible for the development
- Short term commitment (30 day no quarrel cancellation policy)

Key features

- Fully responsive mobile-first booking system
- Customisable booking "widget" can be styled to match your website
- Supports complex diaries and working patterns
- Fully customisable Email and SMS notifications
- Intuitive user experience for customers and staff
- Comprehensive RESTful API facilitating integration from 3rd party systems
- Support for authenticated customers when combined with Cloudoko Identity
- Full Lagan CRM integration
- Integration to other CRM systems available on request
- Connects securely to your CRM backend (no VPN required)
- Simple setup process (see **On-boarding process** below)

My Cloudoko

Cloudoko Bookings is delivered through our web site at www.cloudoko.com/admin. This area of our site is known as “My Cloudoko” and is the mechanism by which all our Cloud Services are delivered. Customers can log in to the site using credentials which will be created when the service is first activated.

Once logged in to My Cloudoko, you will be presented with a list of Cloudoko environments. We recommend that you have a non-production as well as a production environment so that you can develop and test your online booking processes before making them available to your users.

Administrative user experience

We have worked hard to ensure that managing our services through My Cloudoko is as intuitive as possible, with minimal clutter in the user interface, enabling users to quickly get to grips with the application.

The interface is bright and clean and makes frequent use of graphical icons, and colour coded buttons that infer context behind their action.

Primary navigation

Primary navigation is provided consistently on each page by the horizontal blue bar running across the top of the screen. This allows users to switch quickly between the environments they are controlling, access their profile, or sign out.

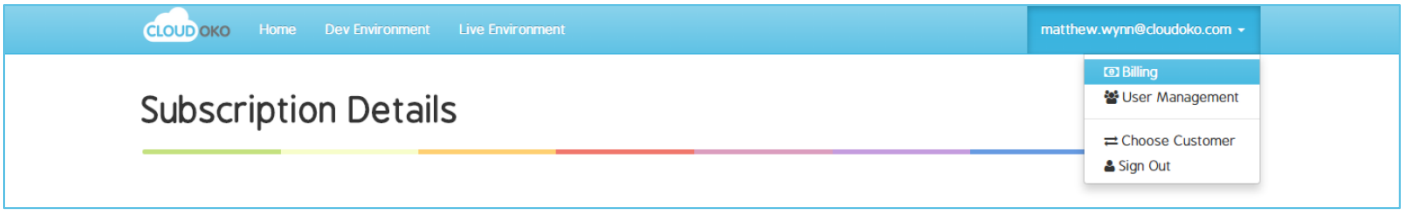


Figure 1 – Showing primary navigation in My Cloudoko

Secondary navigation

Secondary navigation in My Cloudoko is provided below the main heading on each page, and enables quick access to the key functions of the service the user is currently working with. At the far right of the secondary navigation, users will frequently find a “Help” button which offers useful guidance on the operation of that function. This assistance is backed up further by our Knowledge Base which contains useful articles on the more advanced features offered by our service.

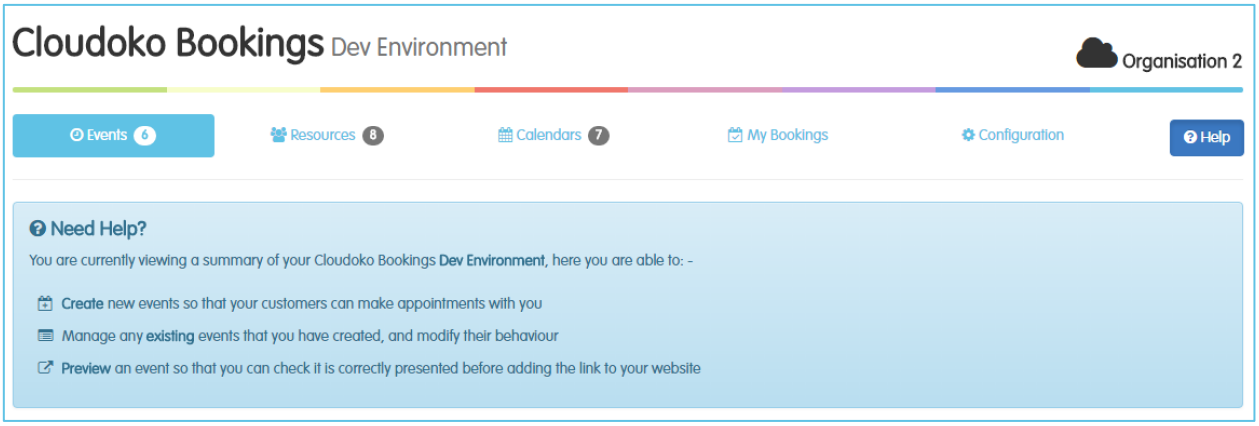


Figure 2 - Secondary navigation and help

Defining resources

Cloudoko Bookings is able to manage appointments for multiple resource types including: -

- People
- Teams
- Rooms

It is possible to customise the attributes that are stored against each Resource to enable expansion of the solution according to your needs.

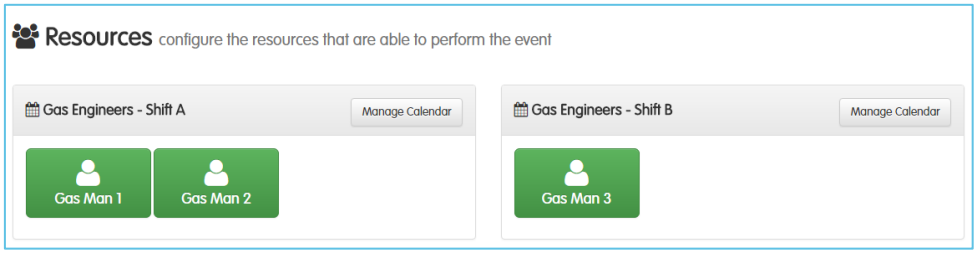


Figure 3 - Defining resources that can carry out a bookable event

Managing resource calendars

At Cloudoko, we understand that your resources have a variety of complex working patterns. We believe that your booking system should not be the limiting factor when trying to make these resources available for online booking. This is why our calendar management system is both simple and highly effective and includes features such as: -

- The ability to schedule weekly working patterns, including those that don't repeat uniformly week in / week out.
- The ability to record specific unavailability windows for a resource - for example where someone in your team has to take planned leave.

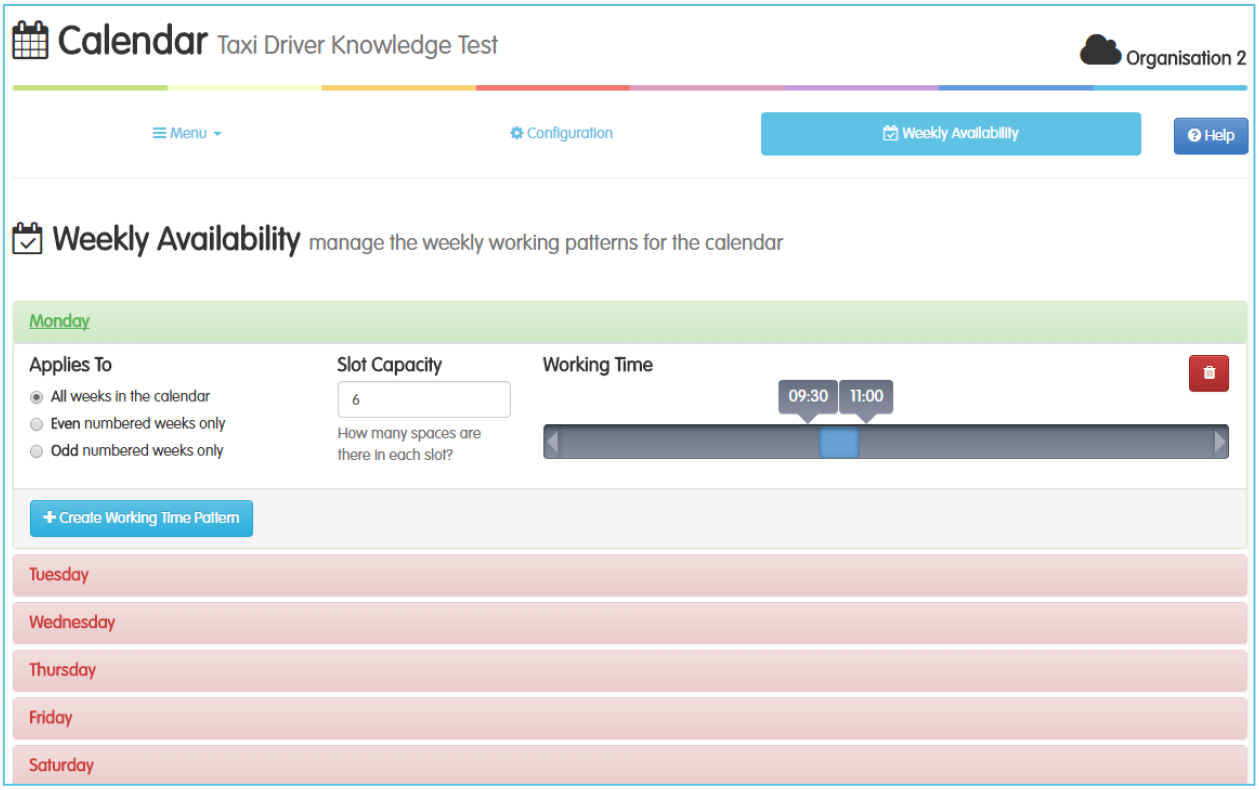


Figure 4 - Managing weekly availability in a calendar

Creating and managing bookable events & services

Events are central to Cloudoko Bookings. The product is capable of managing an unlimited number of events and has been designed such that it can easily accommodate thousands of transactions per day and can scale to meet your needs.

Defining a bookable event in Cloudoko Bookings is a simple activity that requires just a few attributes to be supplied. These attributes control the behaviour of the event both for the customer and administrative user and include: -

- The default length of an appointment slot
- Rules that dictate whether the customer can select longer appointments made up concurrent slots (e.g. a double appointment).
- The length of time an appointment booking is **reserved** allowing the customer to fill in their details. This feature is similar to that seen in online ticketing systems, and ensures that abandoned customer bookings do not cause your resources to appear unavailable to the next customer.
- Rules that control whether repeat bookings can be made.

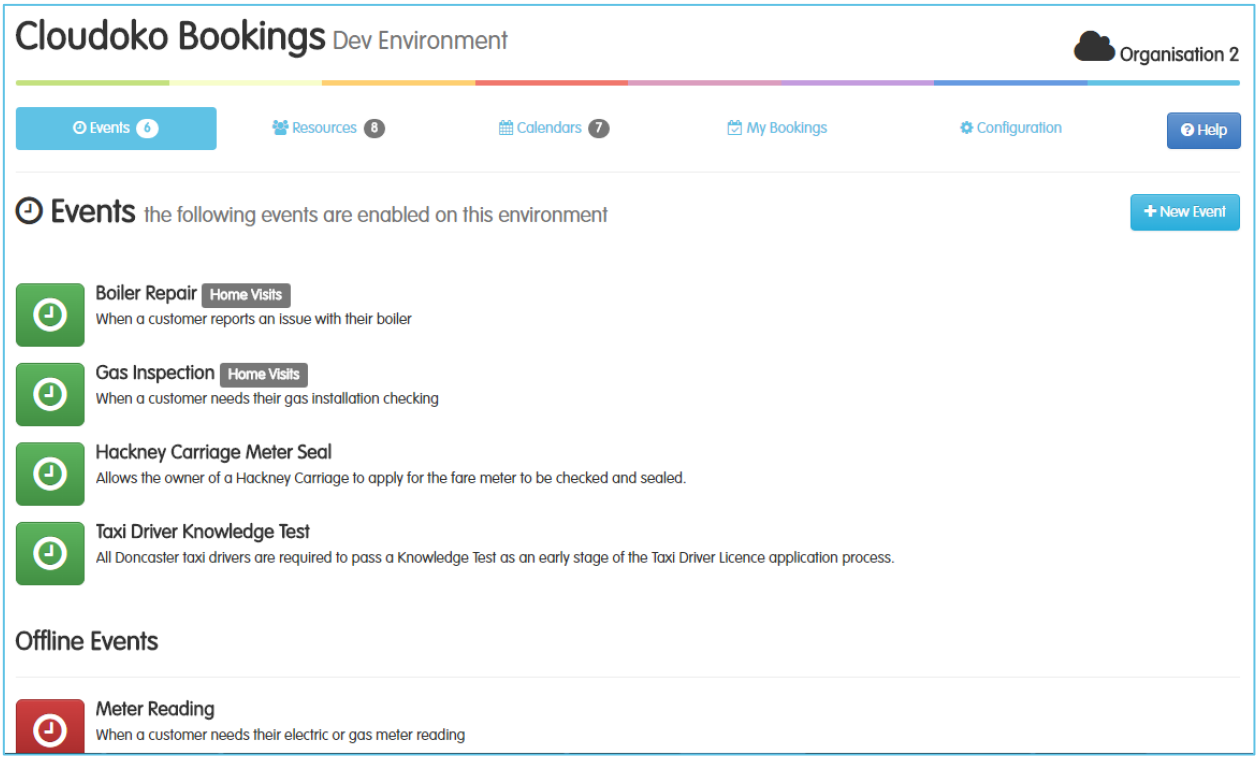


Figure 5 – Showing bookable event management

Managing resource bookings

A comprehensive interface exists for managing and planning resources. This is referred to within Cloudoko Bookings as **My Bookings**. Here you can review the current bookings, and re-arrange or cancel if necessary.

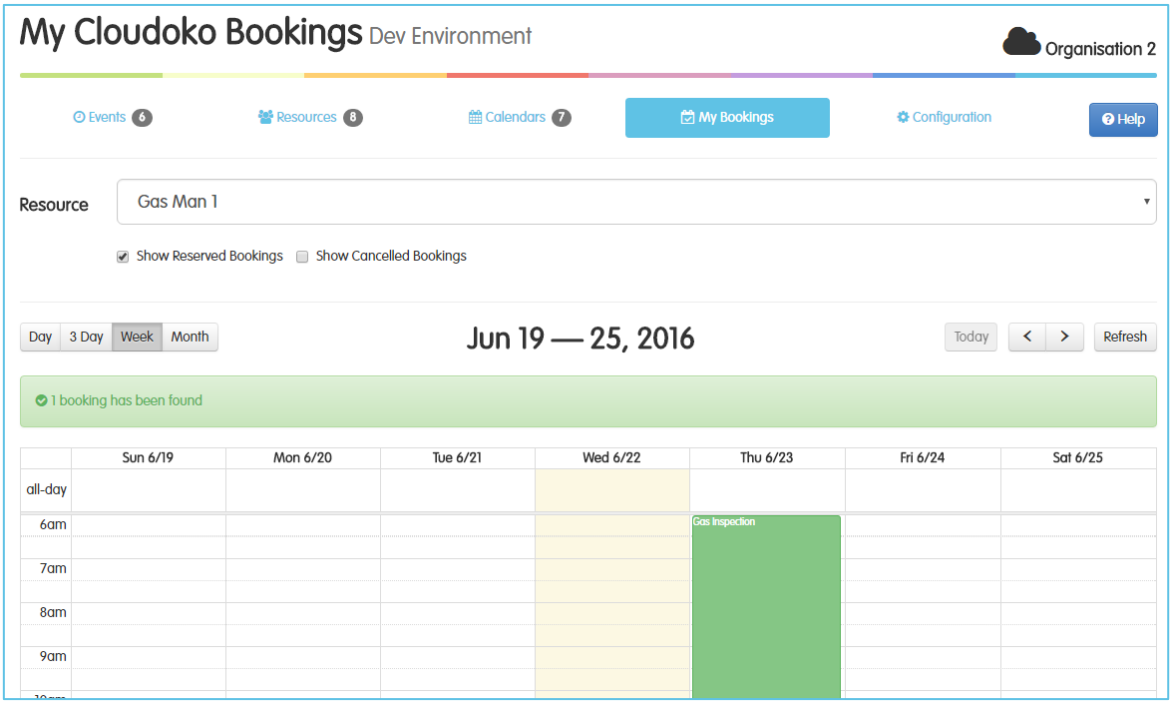


Figure 6 - Showing the MyBookings interface

Email & SMS Customisation

Cloudoko Bookings has a series of events that can trigger notifications to both customers and the booked resources. Each of these event notifications can be configured to your requirements.

With regards to Email, we have our own SMTP servers which we can send the mail from, or if you prefer we can configure our Cloudoko Driver software (see below) to use your own servers.

Similarly, we use Twilio for SMS communication by default, but if you have another provider that you would like us to integrate with, this can be arranged as a separate activity using consultancy days defined on our SFIA rate card.

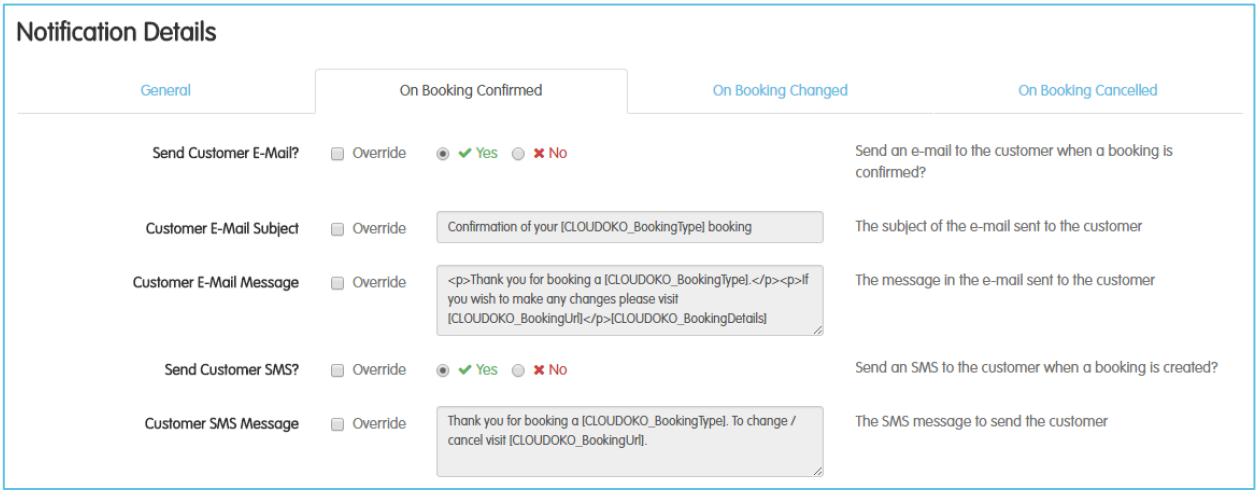


Figure 7 - Event customisation

Customer experience

Cloudoko Bookings can operate as a standalone web page, or it can be embedded amongst other content on your own web site for a truly integrated look and feel. Full hosting instructions are available to administrators through the My Cloudoko portal.

Booking data capture

The booking process for customers is simple and intuitive. **For more advanced data capture scenarios we recommend that you deploy our Cloudoko Forms service which can be combined with Cloudoko Bookings to great effect.**

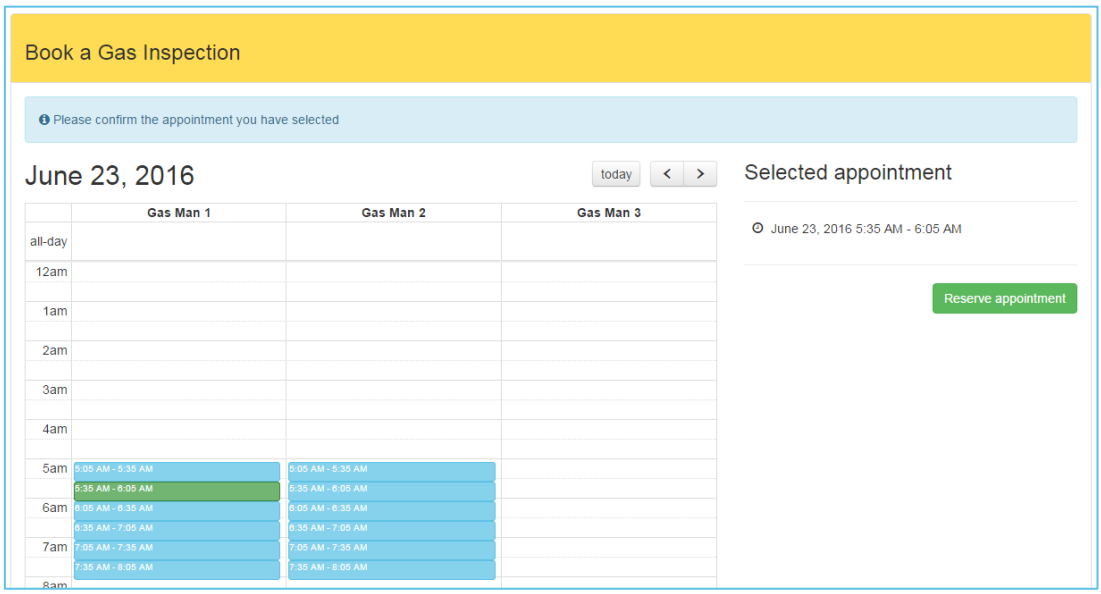


Figure 8 - Customer booking interface

Reserved appointments

During the booking process, customers are given a configurable amount of time to complete their booking and confirm the appointment. If this time expires, the booking is automatically cancelled and the time is made available again for the next customer to book.

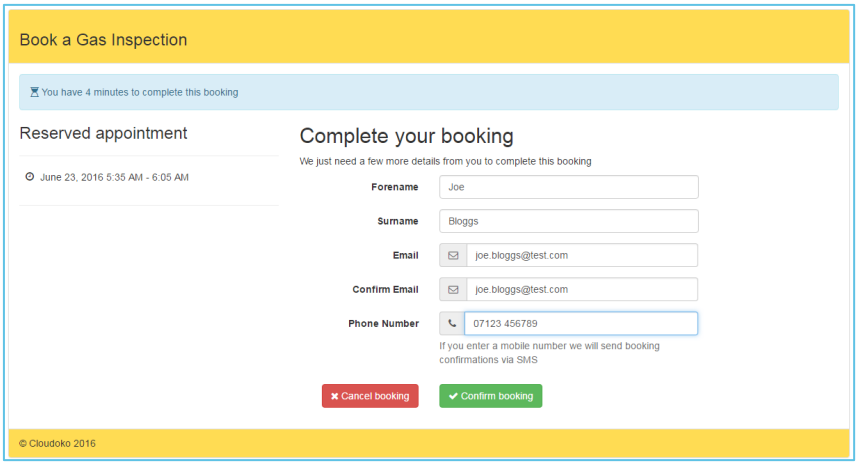


Figure 9 - Reserved appointments

Look and feel customisation

We can style the booking widget to match your corporate branding scheme. This will be carried out as part of the service installation.

CRM integration

Corporate CRM is likely to be one of the largest IT investments within a public sector organisation. We often find that there is a shortfall of internal knowledge about the configuration of the CRM and how best to integrate with it.

This can pose problems for organisations looking to venture into the world of digital self-service.

Cloudoko Bookings can help you maximise the use of your CRM by ensuring that any appointments that are created are linked to a customer / service request record. This enables your contact centre agents on the telephone / email channel to deal with any requests relating to a booking.

Lagan CRM support

We have an out of the box integration for KANA / Lagan CRM customers.

Cloudoko Bookings can be used inside the Lagan Agent Desktop application. The integration creates a Task against a Case record in the Lagan Agent Desktop application for each Cloudoko Booking type that requires it. Any changes made to the booking are fed back into Lagan so that your agents always have an up to date view.

Support for other CRM systems

The Cloudoko platform is a highly extensible architecture. We are always open to working with other solution providers.

Trial service

We offer a free 30-day trial period to evaluate our service. The service is fully functional during the trial period and is initiated by the set-up process detailed below. Extensions to this trial period can be negotiated on a case by case basis.

On-boarding & set-up process

Upon receipt of an order, we shall jointly agree an **effective date** for your service to commence. The monthly anniversary of this date shall become the **invoice day** each month for your Cloudoko Bookings subscription.

Nominated service users

Once we have received a signed service order form, we will ask you to provide the names and email addresses of the people you wish to nominate for the following roles in your organisation.

- **Billing contact(s)** – the person(s) who will receive invoices, and view the Cloudoko Billing portal
- **User manager(s)** – the person(s) who will be responsible for providing access to your Cloudoko Bookings service to other individuals in your organisation.
- **Service desk user(s)** – the person(s) who will require access to our service desk to raise technical issues.

Technical installation

Our cloud service does **not** use a VPN connection in order to connect to your network.

We employ our own software known as the **Cloudoko Driver** which initiates an outbound connection to our Cloud infrastructure by way of a secure Service Bus Relay provided through Microsoft Azure.

A key advantage of our approach is that we do not require your network administrators to open inbound ports on your firewall in order for our service to function.

A Cloudoko Driver installation is required for each Cloudoko Environment you wish to run (e.g. Development / Production).

The server(s) where you install the Cloudoko Driver must have access and permissions to:

- Connect to your CRM SQL database (in read-only mode)
- Connect to your CRM web services / API (where applicable)
- Establish an **outbound** connection to a secure Service Bus Relay running on Microsoft Azure infrastructure.

- N.B. We provide connectivity checking software with the Cloudoko Driver installation to ensure that the correct outbound ports have been enabled.

The Cloudoko Driver software for each environment can be downloaded and installed from the My Cloudoko site once we have enabled your service. Full instructions on the installation process can be found on this guide in our Knowledge Base.

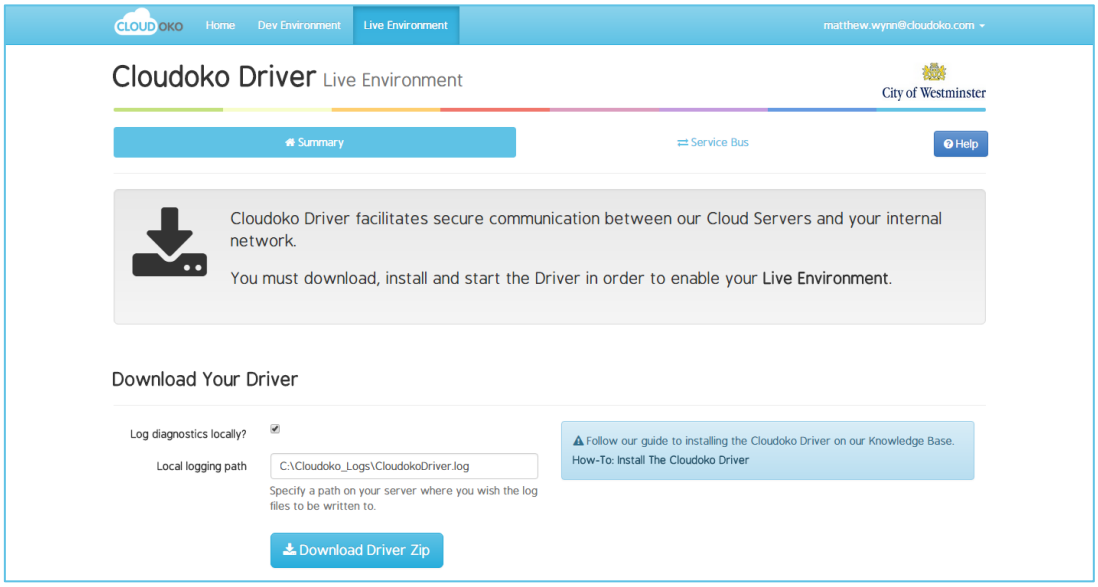


Figure 10 – Showing Cloudoko Driver software download page

Invoicing process

We invoice monthly by email to the nominated **billing contact(s)**. In addition to this we also provide access for these individual(s) to the billing area of the My Cloudoko site. The billing area enables users to view the active subscriptions they hold with Cloudoko including all invoices raised and can assist with your financial reconciliation processes.

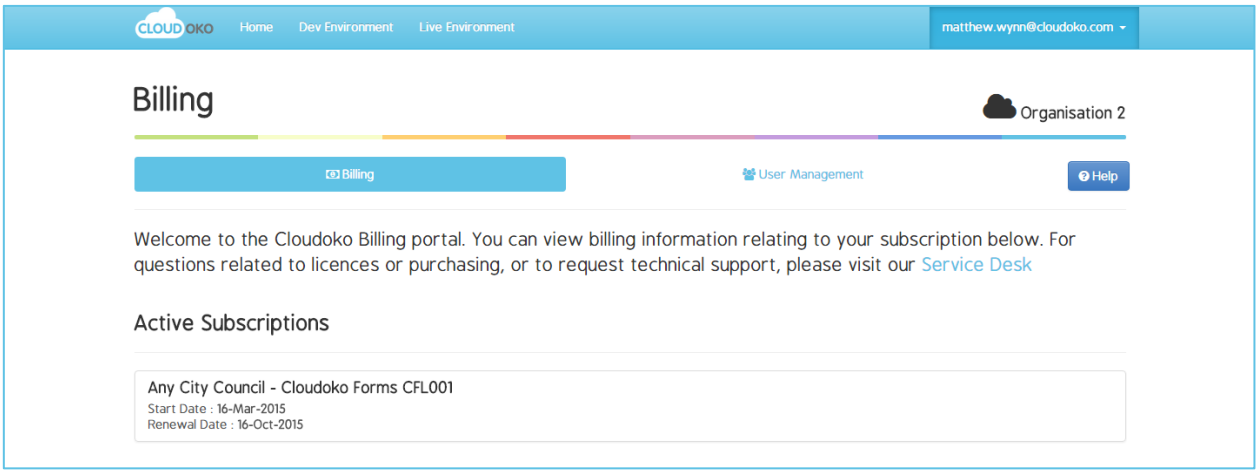


Figure 11 - Cloudoko subscription management

Off-boarding & cancellation process

You may cancel your Cloudoko Bookings subscription at any time to conclude on the final day of the month next following the expiry of a minimum of 30 days' notice. Example 1: if notice is served on 27 March, the Subscription for this Service Offering shall expire at 23:59 on 30 April. Example 2: if notice is served on 2 April, the Subscription for this Service Offering shall expire at 23:59 on 31 May.

Upon expiry of your subscription, you should un-install and delete all copies of our Cloudoko Driver software. We will disable your access to the My Cloudoko portal, and remove your Cloudoko Bookings installations from our cloud servers.

Backup and disaster recovery

Our service stores a link to a booking inside your CRM. Therefore some of the data generated by our services is stored and backed up by your CRM software.

All other data is stored in our database and comprises the following:

- Details of the bookings made and your customers.
- Configuration data about your bookable resources and their working patterns.
- Configuration data that tells our service how to connect to your CRM system.

This data is stored in SQL database servers in our cloud network which are continually backed up and can be restored back to the previous day.

Service levels

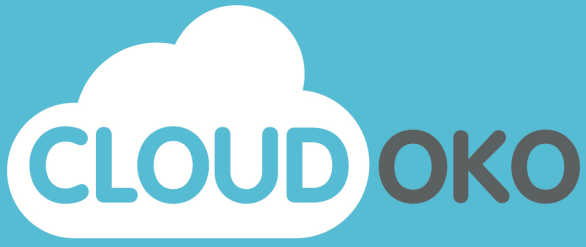
As per clause 9 of our subscription agreement we shall use commercially reasonable endeavours to make our service available 24 hours a day, 7 days a week.

Our typical maintenance window is between 10pm and 2am UK time.

Our service desk is open during normal Cloudoko business hours (9am – 5pm UK time), however we do monitor the desk outside of these hours and will respond to emergency situations.

Training

As part of the service installation, we will commit to providing one day's training on site. Further training can be arranged at the rates discussed in our SFIA rate card.



www.cloudoko.com